

## UPTOWN CROSSING

### BUSINESS IMPROVEMENT DISTRICT



## Uptown Crossing BID is seeking proposals for the purchase and redevelopment of Hartter Bakery Buildings

5507 – 5513 West North Avenue  
located in the Uptown Crossing neighborhood

### PROPERTY DETAILS

See attached Ogden & Company information sheets.

### OFFERING PRICE AND INVESTMENT

The asking prices for each parcel are listed per attached  
Ogden & Company information sheets.

### PROPERTY SHOWING

BID #16 personnel will show the properties upon request.  
Contact Marsha McNeil at 414.270.4163 or [marsham@ogdenre.com](mailto:marsham@ogdenre.com) to arrange a showing.

**Note:** BID#16 and its personnel are serving as owner's  
representatives and does not own the property herein.

### PROPERTY USE & REDEVELOPMENT

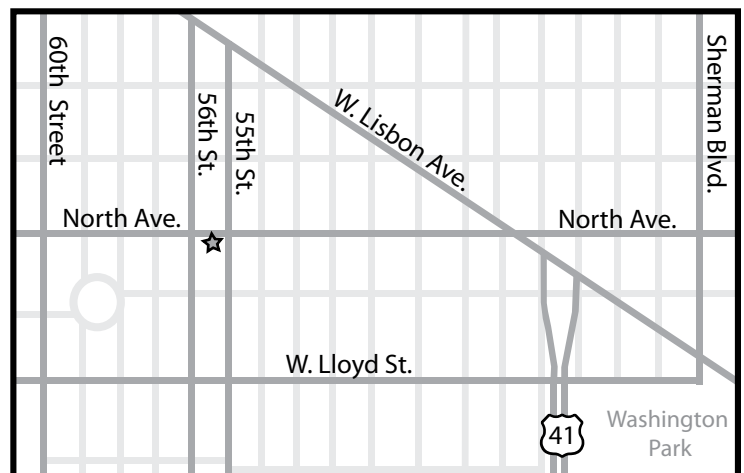
- The building should be renovated according to the standards attached to the RFP.
- The Buyer must obtain City Building & Occupancy Permits for the buildings as evidence of buyer's redevelopment.
- The Uptown Crossing BID is willing to make a financial investment in the redevelopment of between \$25,000 to \$75,000, with terms to be negotiated, based on the merit of the project proposal and how it aligns with the goals of the BID.

Alternate use may be permitted if allowed under current zoning.  
Conversion to an alternate use or change in the current site configuration may trigger additional zoning requirements.

Proposals are due at or before  
2:00 p.m. on June 7, 2011.  
Proposals must be received at:  
Uptown Crossing, BID #16,  
c/o Ogden & Company, Inc.  
1665 North Water Street  
Milwaukee, WI 53202  
before the deadline.

Proposals may also be submitted via e-mail to:  
[marsham@ogdenre.com](mailto:marsham@ogdenre.com).

Please provide three (3) copies of the proposal. Proposals submitted after the deadline or to other locations will not be accepted.





## UPTOWN CROSSING BUSINESS IMPROVEMENT DISTRICT

Bid #16 is working with the City of Milwaukee Department of City Development. Funding may be available depending upon the proposal being submitted and how the proposal supports BID#16 and DCD objectives.

The BID may also consider a letter of interest from potential users if the parties are not prepared to submit a full RFP.

### PROPOSAL PROCESS

Submit the following information on or before 2:00 p.m. on June 7, 2011:

- A Letter of Interest
  - We welcome businesses and development teams to submit a proposal on the property.
- A Project Summary
  - Identify the proposed use for the property.
  - Outline preliminary budget (hard & soft costs). A line-item renovation budget may be submitted with the scope of work.
  - Identify financing sources. Attach a letter of interest from a financial institution if possible.
  - Discuss development team; include development experience and past projects.
- Scope of work detailing proposed renovations and site improvements. The Uptown Crossing BID is most interested in the improvements to the exterior of the building and the ground floor retail space.
  - Proposed renderings must be included if any exterior alternations are to be made.
  - A site plan must be provided if changes are made to the lot.
  - A proposed project schedule must be provided showing construction phases and completion of the work.
- Proposals must be received before 2:00 p.m. on June 7, 2011. Please provide three (3) copies of the proposal. Proposals may be submitted via e-mail to [marsham@ogdenre.com](mailto:marsham@ogdenre.com).

### BID POLICIES

- Proposals will be rejected from any party (as an individual or as part of an entity) who:
- Is delinquent in the payment of taxes for property in the City of Milwaukee
- Has outstanding judgments from the City or if the City acquired property-tax-foreclosure judgment
- Has outstanding health or building code violations or order from the City's Health Department or Department of Neighborhood Services that are not actively being abated
- Has been convicted of a felony that relates to neighborhood stability, health, safety or welfare
- Tax and court records will also be checked prior to Closing. If any of these conditions are found to exist, the BID will terminate the Purchase and Sale Agreement and retain all fees submitted by Buyer.

### REVIEW & SELECTION

Submissions will be reviewed by BID #16 within three (3) weeks of submittal according to the following criteria:

- Offering price
- Extent of proposed renovation
- Rehabilitation experience of buyer and/or buyer's contractors
- Schedule and completion of all minimum rehab standards

### OTHER APPROVALS

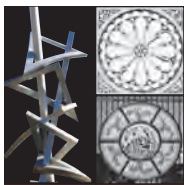
Buyer is solely responsible for obtaining approval of the Board of Zoning Appeals for uses or development requirements that are not expressly permitted by the zoning code. If BOZA approval is required, BID #16 will assist buyer to obtain such approval prior to closing.

BID #16 reserves the right to reject any and all proposals for any reason at its sole discretion, to negotiate the terms and conditions of the eventual contract with the Buyer awarded the purchase and development rights, and to impose additional use restrictions, if necessary.

The contents of this packet are for informational purposes only and the representations made herein, though thought to be accurate, and without warranty. Buyer should rely exclusively on their own investigations and analyses.

### QUESTIONS & ADDITIONAL SHOWINGS

Contact Marsha McNeil, 414.270.4163 or [marsham@ogdenre.com](mailto:marsham@ogdenre.com).



## UPTOWN CROSSING BUSINESS IMPROVEMENT DISTRICT

### PROPERTY

Hartter Bakery  
5507 – 5513 West North Avenue  
Milwaukee, WI

### OFFER INFORMATION

Offer Price: \$ \_\_\_\_\_

Contingences :

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Is the offer being submitted by a licensed broker? ☐ Yes ☐ No

Broker Name \_\_\_\_\_ Telephone \_\_\_\_\_

Firm \_\_\_\_\_ Address \_\_\_\_\_

*Brokerage fee paid as outlined in the RFP and only if a broker submits the initial offer.*

### BUYER IDENTIFICATION

Legal Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

Primary Contact \_\_\_\_\_ Telephone \_\_\_\_\_

Email: \_\_\_\_\_ Fax \_\_\_\_\_

Buyer Attorney \_\_\_\_\_

Legal Entity

Individual(s) If multiple, identify:

☐ Joint Tenants ☐ Tenants in Common ☐ Corporation ☐ LLC ☐ Partnership ☐ Other \_\_\_\_\_

If not a Wisconsin corporation/partnership, state where organized: \_\_\_\_\_

Will new entity be created for ownership ☐ Yes ☐ No

Principals of existing or proposed corporation/partnership and extent of ownership interest.

Name \_\_\_\_\_

Address \_\_\_\_\_

Title Interest :

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Attach a list of properties in the City of Milwaukee in which buyer has an ownership interest either as individual or as part of a corporation/partnership.

## PROJECT DESCRIPTION

Describe project/proposed use:

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## PROPERTY SUMMARY

Building Area \_\_\_\_\_ SF    # Stories \_\_\_\_\_    Basement ☐ Yes ☐ No  
Land Area \_\_\_\_\_ SF    # Units \_\_\_\_\_    # Parking Spaces \_\_\_\_\_  
How will storm water be managed? \_\_\_\_\_  
Will project incorporate any “sustainable” concepts? \_\_\_\_\_  
Will development include private land? ☐ Yes ☐ No  
For income property, estimated sale or rental range \_\_\_\_\_  
Will a zoning change be requested? \_\_\_\_\_  
Identify other approvals, permits or licenses (i.e. BOZA, Health Department, etc.) \_\_\_\_\_

Discuss neighborhood impact/support:

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*Note: Project must be fully taxable for property tax purposes. See BID Policies below.*

## DEVELOPMENT TEAM

Developer \_\_\_\_\_  
Community Partners \_\_\_\_\_  
Architect \_\_\_\_\_  
Surveyor \_\_\_\_\_  
Contractor \_\_\_\_\_  
Sales Agent/Property Manager \_\_\_\_\_  
Other Members \_\_\_\_\_

Describe team expertise and experience:

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Other Team projects:

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## PROJECT BUDGET & FINANCIAL STRATEGY

### Budget Summary

Property Acquisition (public & private)	\$ _____
Environmental testing/remediation (Buyer's share)	\$ _____
Demolition (if applicable)	\$ _____
Hard construction/rehabilitation costs	\$ _____
Soft costs – architectural fees, permits, misc. Charges, overhead & profit, etc.	\$ _____
Financing fees	\$ _____
Total cost	\$ _____

Budget source ☐ Developer ☐ Architect ☐ Contractor ☐ Other \_\_\_\_\_

Attached detailed summary or pro-forma income analysis as necessary. \_\_\_\_\_

### Financing

Property purchase will be ☐ Financed ☐ Cash

Construction/rehabilitation will be ☐ Financed ☐ Cash

Lender \_\_\_\_\_

Loan Amount \$ \_\_\_\_\_ Pre-approved ☐ Yes ☐ No

(Attach pre-approval or letter of interest; May be asked to provide evidence of equity)

Grants involved ☐ Yes ☐ No

Sources \_\_\_\_\_

Application status \_\_\_\_\_

Likelihood of award \_\_\_\_\_

Other funding \_\_\_\_\_

## ESTIMATED SCHEDULE

Final Plan/Specification Preparation \_\_\_\_\_

Bidding & Contracting \_\_\_\_\_

Firm Financing Approval \_\_\_\_\_

Construction/Rehabilitation \_\_\_\_\_

Landscaping/Site Work \_\_\_\_\_

Occupancy/Lease Up \_\_\_\_\_

## CONFLICT OF INTEREST DISCLOSURE

Buyer covenants that no member of the Common Council of the City of Milwaukee, nor any of its officers or employees, has any interest in the Buyer or the intended redevelopment of the property, except as follows:

\_\_\_\_\_  
\_\_\_\_\_

Is Buyer a City of Milwaukee employee or member of any City board? ☐ Yes ☐ No

If yes, identify the department, board and/or position: \_\_\_\_\_



## **Hartter Buildings**

5507-5509 & 5511-5513 West North Avenue, Milwaukee, WI 53202  
Quorum Architects Project #10019.00

### **Preliminary Pricing Scope Specifications**

Based on Plans: SK-1, EC1.0, EC1.3, D1.1, D1.2, SP1.1, SP1.2

Dated 10/8/2010

The following scope is based on a conditions assessment of the Hartter Bakery Buildings at 5507-5509 & 5511-5513 West North Avenue, Milwaukee, WI 53202. This document has been compiled by BID #16 and its personnel. These parties are serving as the owner's representative and does not own the property referenced herein.

At a minimum, all mechanical work must be completed to stabilize the buildings for occupancy. The BID prefers the completion of all exterior work to improve the overall look and image condition of the buildings. All interior work is based on recommendations by the architects to create marketable spaces for the buildings' reuse and is not required to be considered the successful proposer. Existing equipment, identified as removed in the attached drawings, may be retained for if deemed appropriate by end user.

### **General Conditions**

Completely developed Architectural Plans and Scope Specifications are to be for competitive bidding at a future date. General Conditions of the Contract for Construction, AIA Document A201, 1997 Edition will be incorporated by reference and will be a part of the Project Manual.

- Contractor will be responsible for providing shop drawings, product cut sheets, samples, etc. for review and approval by the Architect or Owner.
- Architect will submit plans to the City of Milwaukee and pay any plan exam fees.
- Contractor will be responsible for obtaining and paying for construction and occupancy permits.
- Contractor will be responsible for obtaining and paying for any permits to do work in or temporarily occupy the public right-of-way.
- Contractor shall allow for other miscellaneous fees including, but not limited to equipment rental, scaffolding, dumpster rental, landfill fees, temporary barriers, erosion control permits, etc.
- Contractor shall develop a written or graphic construction schedule for Owner approval and shall be responsible for updating same at weekly construction meetings.
- Work in all divisions listed below to be done under the general construction contract unless specifically listed as by Owner or other party.

### **Contingency**





Contractor shall carry a contingency of 15% of construction cost for the preliminary pricing plan.

### **Code Review for 5507-5509 & 5511-5513 West North Avenue**

- Zoning: LB2
  - o Two-Family Dwelling: Permitted
  - o Multi-Family Dwelling: Permitted
  - o Live-Work Unit: Permitted
  - o General Office: Permitted
  - o Retail Establishment, General: Limited Use
- Building Construction Type: VB
- Existing Building Use Group:
  - o 1<sup>st</sup> Floor: M (Mercantile)
  - o 2<sup>nd</sup> Floor: R-3 (Residential)
- Proposed Building Use Group:
  - o 1<sup>st</sup> Floor: M (Mercantile)
  - o 2<sup>nd</sup> Floor : R-3 (Residential)
- Alteration Level 5507-5509: IEBC Level 2
  - o  $[(\text{Altered Area}/\text{Total Area}) \times 100 < 50\%]$
  - o  $[(780/2040) \times 100 = 38\% < 50\%]$
- Alteration Level 5511-5513: IEBC Level 2
  - o  $[(\text{Altered Area}/\text{Total Area}) \times 100 < 50\%]$
  - o  $[(1645/4240) \times 100 = 39\% < 50\%]$

### **Scope of Work for 5507-5509 West North Avenue**

#### **General Demolition**

- Remove existing interior partitions on the first and second floors per plans.
- Remove existing wood paneling from walls on second floor.
- Remove existing signage, glass, and storefront Patch as required.
- Remove existing cold storage from east side of building. Patch as required. (Provide pricing as add alternate)
- Remove first floor awnings on north façade. Patch as required.
- Remove existing roofing material.
- Remove all existing wainscot wood paneling.
- Remove all existing light fixtures at first floor.
- Remove false display backing at raised storefront display area.
- Remove window air conditioning unit from second floor living room.
- Remove existing 1 story connection between buildings.

#### **Existing Utilities**

- Confirm existing conditions are sufficient for future use of the building and provide for necessary upgrades.
  - o Existing Conditions:
    - One (1) 50 gallon gas fired hot water heater



- Power supply to building at southwest corner of the building and fed to two meters on the west wall of the basement to two (2) 60 amp 3-phase meters.
- Power supply is sub-metered into first and second floors.
- Water supply comes in the building in the basement at the north wall through a 1" pipe from North Avenue. Contractor to verify supply.
- A 6" waste line goes out to North Avenue through the north wall of the basement at the northeast corner.
- Gas service is dual metered and comes in to building from North Avenue in the northeast corner of the building to gas fired boiler. Condition of boiler unknown.

#### Site Work – Division 2

- Remove invasive ivy from exterior of building.

#### Masonry – Division 4

- Tuckpoint brick on north façade.

#### Wood & Plastic – Division 6

- Repair and replace soffit boards as needed.
- Replace second floor back porch.
- Provide new kitchen counters at apartment per plan.

#### Thermal and Moisture Protection – Division 7

- Provide new gutters and downspouts.
- Provide new roof for building.

#### Doors & Windows – Division 8

- Provide new second floor back door to allow for new porch access.
- Provide new first floor exterior door for south façade.
- Provide new window to match existing where window air conditioning unit was removed.

#### Glazing – Division 8

- Provide new storefront glazing per plans and rendering.

#### Finishes – Division 9

- Scrape and paint existing double hung wood windows throughout.
- Scrape and paint soffit.
- Paint existing stucco.
- Patch stucco as required.





- Paint exterior wood trim.
- Paint exterior door to second floor apartments on north façade.
- Prime and paint first floor ceiling and walls.
- Provide new ceramic tile at entry first floor storefront entry.
- Patch and paint walls at removed cold storage entry. (Provide add alternate pricing.)
- Provide new 1-hour rated infill at connection between buildings to match existing adjacent construction.
- Patch and paint all second floor walls and ceilings.
- Clean all existing wood floors.
- Provide new kitchen, pantry, bathroom, hallway and stair landing flooring at second floor apartment.
- Provide new sheet good flooring over existing at first floor north entry to apartment.
- Provide new wall tile at second floor apartment bathroom.
- Provide new wall per plans.

#### Specialties – Division 10

- Provide new kitchen appliances.

#### Plumbing – Division 15

- Provide new kitchen plumbing and fixtures per plan.
- Provide new tub and shower controls at second floor apartment
- Provide new sink at second floor apartment bathroom.

#### Mechanical – Division 15

- Provide new gas fired boiler as required. (Provide pricing as add alternate)

#### Electrical – Division 16

- Provide wired carbon monoxide and smoke detectors in the second floor apartment.
- Provide new lighting fixtures for first floor.

## Scope of Work for 5511-5513 West North Avenue

### General Demolition

- Remove existing interior partitions on the first and second floors per plans.
- Remove existing signage, glass, and storefront Patch as required.
- Remove existing cold storage units between building and garage. Patch as required.
- Remove first floor awnings on north façade. Patch as required.
- Remove existing roofing materials.
- Remove equipment exhaust at south and east sides of building.
- Remove all remaining bakery kitchen equipment from first floor.
- Remove existing quarry tile at first floor.
- Remove all Fiberglass Reinforced Panel (FRP) from first floor.
- Remove existing light fixtures from back baking area.
- Remove all wall base at first floor baking area.
- Remove all wall covering at second floor apartments.
- Remove all cabinets, ceiling beams and appliances in second floor kitchen.
- Remove existing 1 story connection between buildings.

### Existing Utilities

- Confirm existing conditions are sufficient for future use of the building and provide for necessary upgrades.
  - o Existing Conditions:
    - One (1) 100 gallon electric hot water heater
    - Power supply to building from southwest corner of the building and fed to one 240 3-phase meter on the south wall of the basement.
    - Power supply sub-metered to two (2) 70 watt panels divided into upper and lower floors.
    - Power supply of one (1) 100 amp service for baking equipment.
    - Water supply comes in the building in the basement at the northwest corner on the north wall through a 1" pipe from North Avenue. Contractor to verify supply.
    - A 6" waste line goes out to North Avenue through the north wall of the basement.
    - Gas service comes in to building from North Avenue to gas fired boiler. Condition of boiler unknown.

### Site Work – Division 2

- Remove invasive ivy from exterior of building.

### Masonry – Division 4

- Tuckpoint garage masonry.





#### Wood & Plastic – Division 6

- Provide new guard and rail at roof top porch at second floor.
- Provide new kitchen counters at apartment per plan.
- Provide new bathroom vanity at north apartment.

#### Thermal and Moisture Protection – Division 7

- Provide new gutters and downspouts.
- Provide new garage roof.
- Provide new roof for the existing rooftop deck on the building addition to the south.

#### Doors & Windows – Division 8

- Provide new door and screen door at second floor access to roof top deck.
- Provide new overhead door at garage.
- Provide new man door at garage.
- Provide new window at garage.

#### Glazing – Division 8

- Provide new storefront glazing per plan and rendering.
- Provide new front door.
- Provide new glazing where equipment exhaust has been removed on south and east sides of building.

#### Finishes – Division 9

- Scrape and paint existing double hung wood windows throughout.
- Scrape and paint soffit.
- Paint existing stucco.
- Patch stucco as required.
- Paint exterior wood trim.
- Paint exterior door to second floor apartments on west façade.
- Patch and paint first floor ceiling and walls with white primer.
- Provide new wall base at back baking area.
- Provide new 1-hour rated infill at connection between buildings to match existing adjacent construction.
- Patch and paint all second floor walls and ceilings.
- Sand and refinish wood floors at north apartment.
- Provide new bathroom floor at north apartment.
- Provide new floor at west stairs, vestibule, and landing.
- Sand and refinish southwest bedroom at south apartment.
- Provide new walls per plans.

#### Specialties – Division 10

- Provide new kitchen appliances at both apartments.





#### Plumbing – Division 15

- Reconnect water service to building.
- Provide new kitchen plumbing and fixtures per plan.
- Provide new toilet and sink at north apartment bathroom.

#### Mechanical – Division 15

- Provide new gas fired boiler as required. (Provide pricing as add alternate)

#### Electrical – Division 16

- Provide wired carbon monoxide and smoke detectors in the second floor apartment.
- Provide new lighting fixtures in back baking area.

This document and the related drawings are intended only to provide a basis for developing a comprehensive preliminary budget and are not meant to be used for developing a guaranteed maximum price or as actual construction documents. The Owner and Architect reserve their right to change the design and/or specifications prior to actual construction.





PRELIMINARY  
NOT FOR  
CONSTRUCTION  
QUORUM ARCHITECTS, INC.

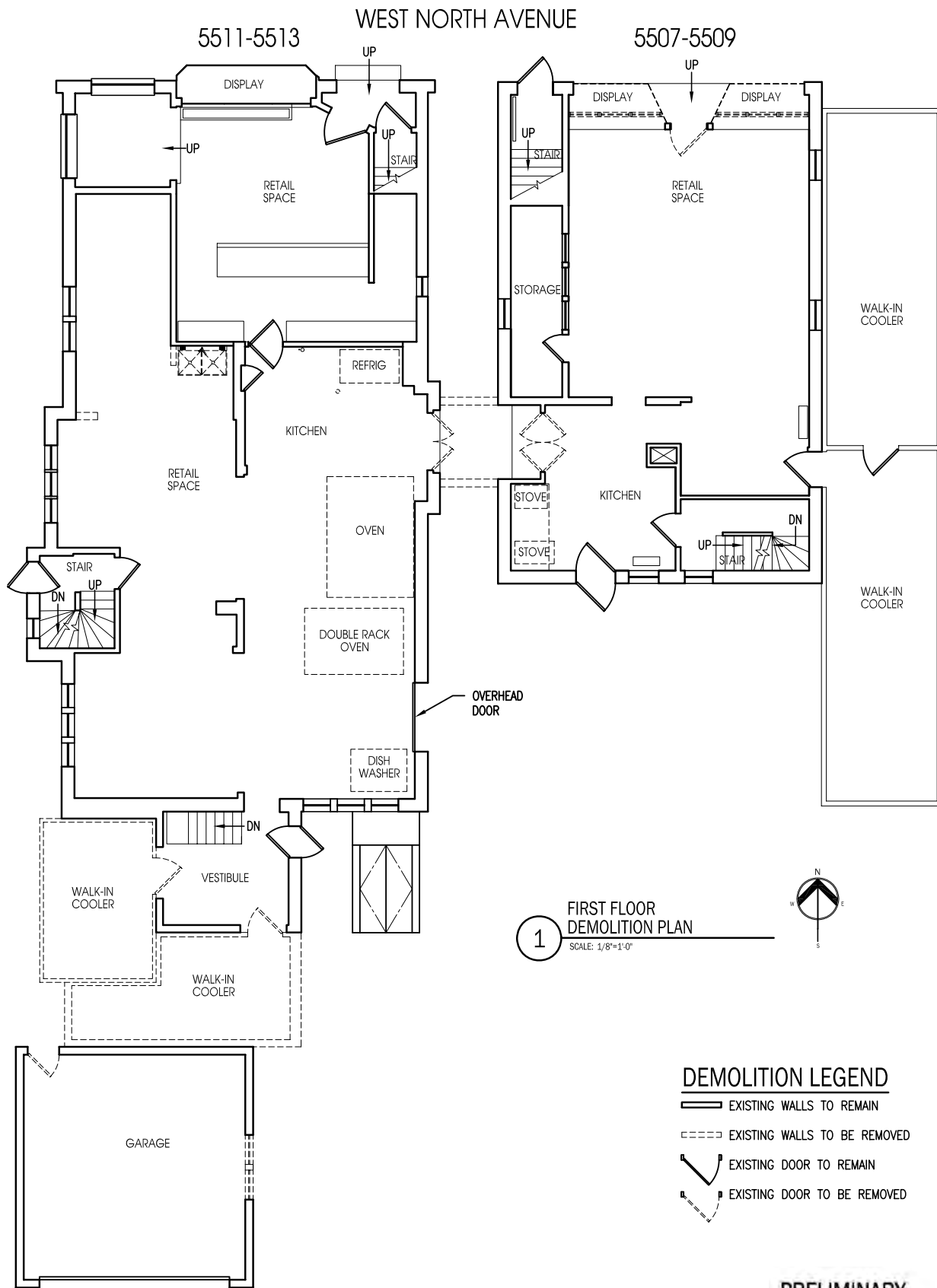


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DATE: 10/8/10	PROJECT: HARTTER BUILDING 5507-5513 WEST NORTH AVENUE MILWAUKEE, WI	DRAWING: SK-1
SHEET REF:		

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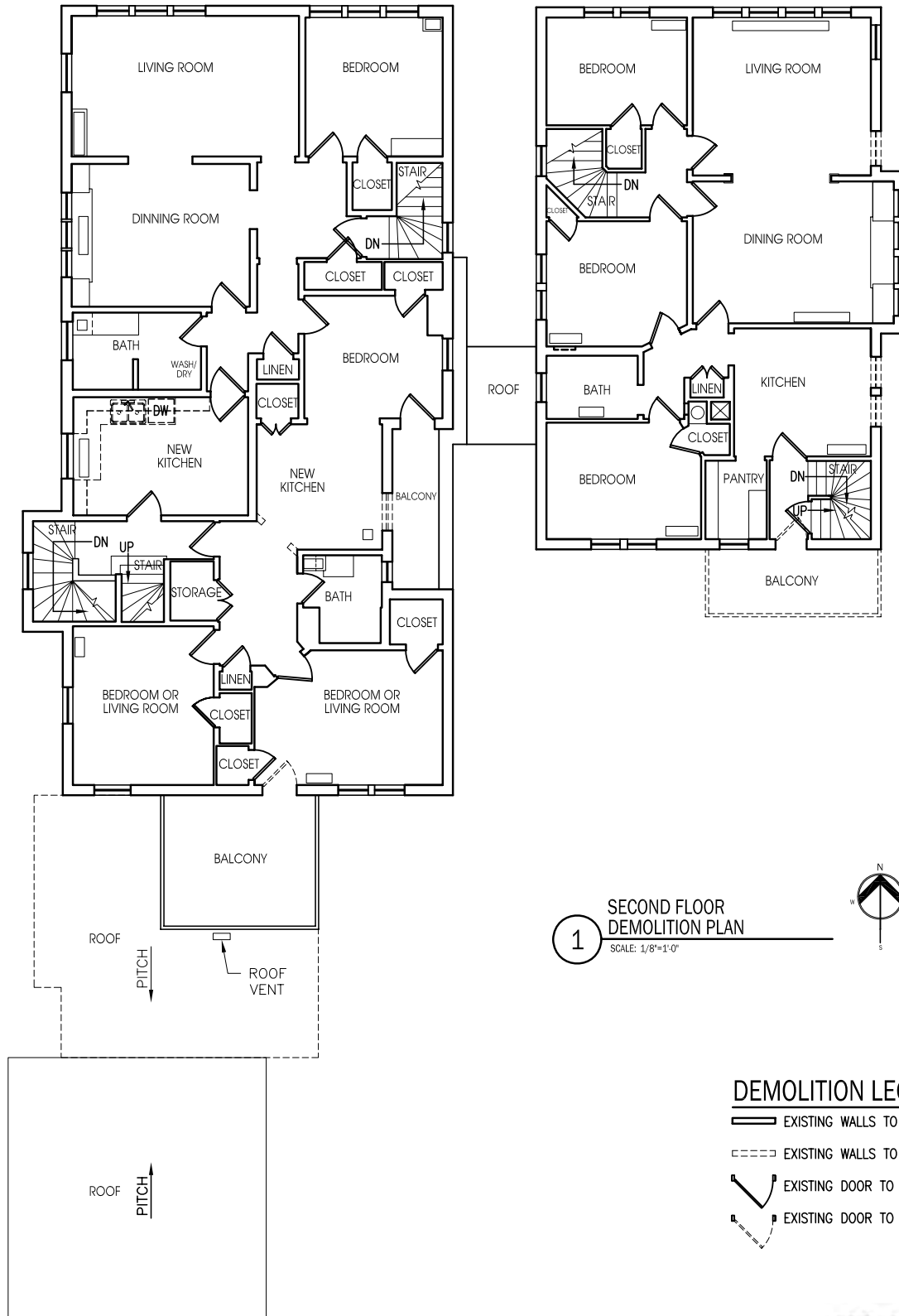


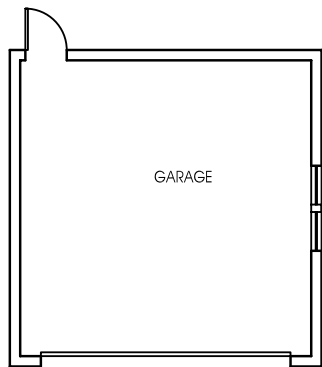
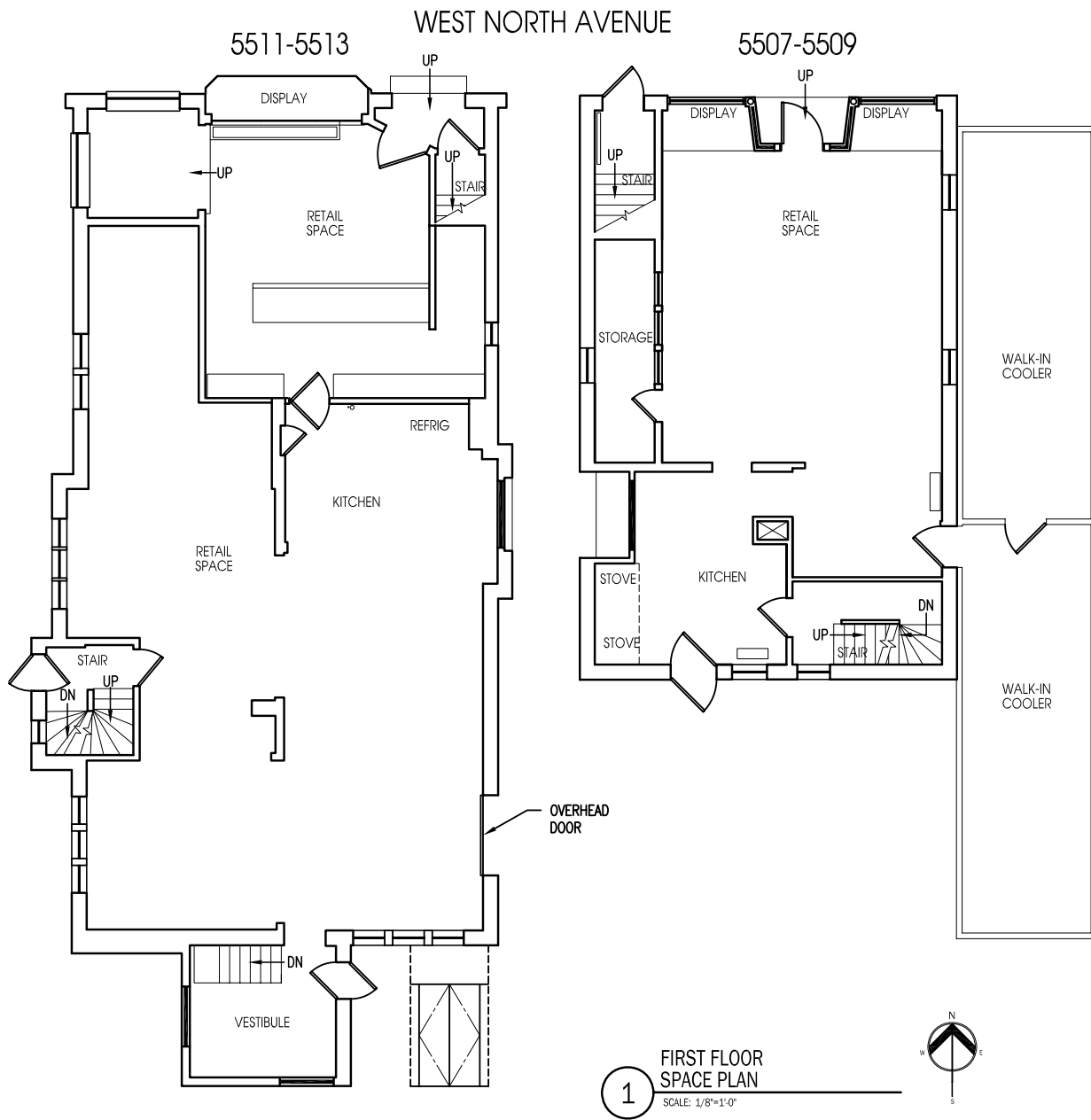


# WEST NORTH AVENUE

5511-5513

5507-5509





### NEW CONSTRUCTION LEGEND

- EXISTING WALLS
- NEW WALLS
- EXISTING DOOR
- NEW 3'-0" DOOR EXCEPT WHERE OTHERWISE INDICATED
- EXISTING COLUMN
- NEW MILLWORK

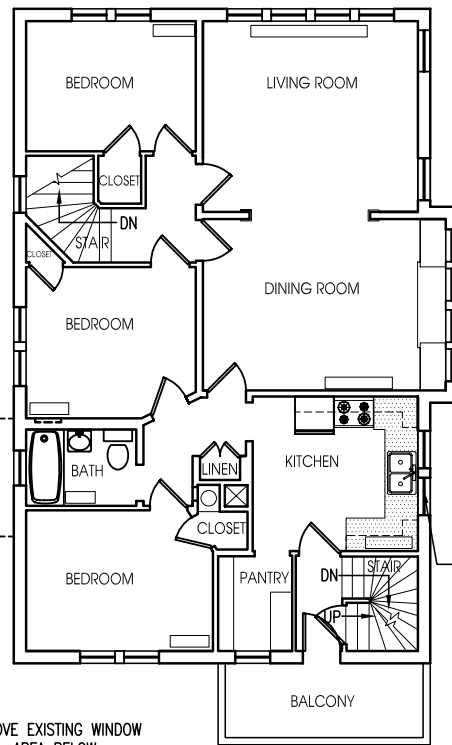
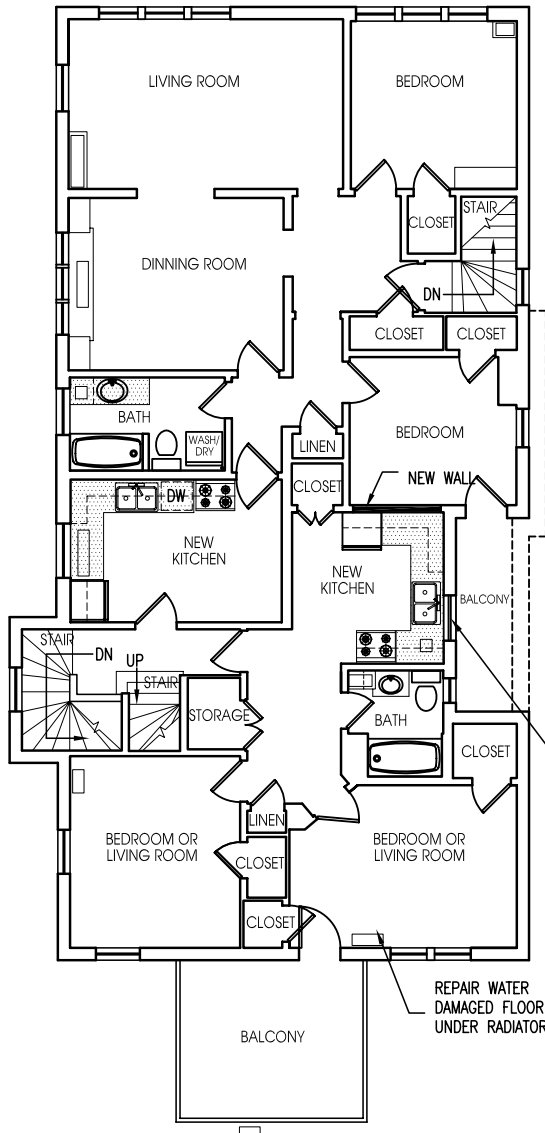
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CONSTRUCTION**  
QUORUM ARCHITECTS, INC.

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DATE: 10/8/10	PROJECT: HARTTER BUILDING 5507-5513 WEST NORTH AVENUE MILWAUKEE, WI	DRAWING: SP1.1
SHEET REF:		

# WEST NORTH AVENUE

5511-5513

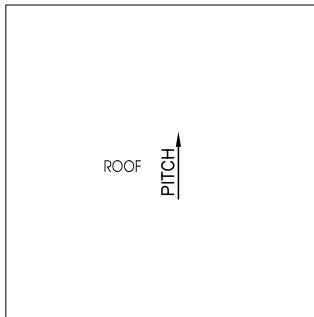
5507-5509



REMOVE EXISTING WINDOW  
INFILL AREA BELOW  
COUNTERTOP AND  
PROVIDE NEW WINDOW.

REMOVE EXISTING  
WINDOW INFILL AREA  
BELOW COUNTERTOP  
AND PROVIDE NEW  
WINDOW.

1 SECOND FLOOR  
SPACE PLAN  
SCALE: 1/8"=1'-0"



## NEW CONSTRUCTION LEGEND

EXISTING WALLS

NEW WALLS

EXISTING DOOR

NEW 3'-0" DOOR EXCEPT  
WHERE OTHERWISE  
INDICATED

EXISTING COLUMN

NEW MILLWORK

**PRELIMINARY  
NOT FOR  
CONSTRUCTION**  
QUORUM ARCHITECTS, INC.



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DATE: 10/8/10	PROJECT: HARTTER BUILDING 5507-5513 WEST NORTH AVENUE MILWAUKEE, WI	DRAWING: SP1.2
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5507-5509



SCALE: 1/8"=1'-0"

ROOF PITCH



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DATE: 10/8/10	PROJECT: HARTTER BUILDING 5507-5513 WEST NORTH AVENUE MILWAUKEE, WI	DRAWING: EC1.3
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NOT FOR  
CONSTRUCTION  
QUORUM ARCHITECTS, INC.

# AVAILABLE

## North Avenue Retail/Apartments

**LOCATION:** 5507-5509 W. North Avenue  
5511-5513 W. North Avenue  
Milwaukee, WI 53208

**SIZE:** 6,314 sq.ft.

**SITE SIZE:** 9,600 sq.ft.

**YEAR BUILT & STRUCTURE:** 1920's  
Masonry

**ZONING:** LB 2- Local Business District

**TRAFFIC COUNT:** W. North Avenue - 11,300  
North 55<sup>th</sup> Street - 9,900

**NEW ASKING PRICE:** **\$198,000** Both or  
**\$110,000** 5507-5509 W. North  
**\$139,000** 5511-5513 W. North

**TAXES (2009):** 5511-5513 = \$5,509.00  
5507-5509 = \$3,525.00



5507-5509 W. North Avenue



5511-5513 W. North Avenue

**COMMENTS:** Former Hartter Bakery  
Location in the Uptown Crossing Business Improvement District, #16. Building still retains some oven and bakery equipment, plus two walk in coolers. The 2nd floor of each building features vintage apartments. Ideal for owner/occupant.

**CONTACT:** **Gordon Steimle**  
**414-270-6364**  
[gordons@ogdenre.com](mailto:gordons@ogdenre.com)



**55<sup>th</sup> & North Avenue**  
**Uptown Crossing**  
**Business Improvement District, #16**

**Ogden & Company, Inc.**  
1665 N. Water Street  
Milwaukee, WI 53202

Phone: 414-276-5285  
Fax: 414-276-4207  
[www.ogdenre.com](http://www.ogdenre.com)

**BROKER DISCLOSURE TO NON-RESIDENTIAL CUSTOMERS**

1 Prior to negotiating on your behalf the Broker must provide you the following disclosure statement:

2 **BROKER DISCLOSURE TO CUSTOMERS**

3 You are a customer of the broker. The broker is either an agent of another party in the transaction or a subagent of another broker  
4 who is the agent of another party in the transaction. The broker, or a salesperson acting on behalf of the broker, may provide  
5 brokerage services to you. Whenever the broker is providing brokerage services to you, the broker owes you, the customer, the  
6 following duties:

7 ■ The duty to provide brokerage services to you fairly and honestly.

8 ■ The duty to exercise reasonable skill and care in providing brokerage services to you.

9 ■ The duty to provide you with accurate information about market conditions within a reasonable time if you request it, unless  
10 disclosure of the information is prohibited by law.

11 ■ The duty to disclose to you in writing certain material adverse facts about a property, unless disclosure of the information is  
12 prohibited by law (**See Lines 47-55**).

13 ■ The duty to protect your confidentiality. Unless the law requires it, the broker will not disclose your confidential information or the  
14 confidential information of other parties (**See Lines 22-39**).

15 ■ The duty to safeguard trust funds and other property the broker holds.

16 ■ The duty, when negotiating, to present contract proposals in an objective and unbiased manner and disclose the advantages and  
17 disadvantages of the proposals.

18 Please review this information carefully. A broker or salesperson can answer your questions about brokerage services, but if you  
19 need legal advice, tax advice, or a professional home inspection, contact an attorney, tax advisor, or home inspector.

20 This disclosure is required by section 452.135 of the Wisconsin statutes and is for information only. It is a plain-language summary of  
21 a broker's duties to a customer under section 452.133 (1) of the Wisconsin statutes.

22 **CONFIDENTIALITY NOTICE TO CUSTOMERS**

23 BROKER WILL KEEP CONFIDENTIAL ANY INFORMATION GIVEN TO BROKER IN CONFIDENCE, OR ANY INFORMATION  
24 OBTAINED BY BROKER THAT HE OR SHE KNOWS A REASONABLE PERSON WOULD WANT TO BE KEPT CONFIDENTIAL,  
25 UNLESS THE INFORMATION MUST BE DISCLOSED BY LAW OR YOU AUTHORIZE THE BROKER TO DISCLOSE PARTICULAR  
26 INFORMATION. A BROKER SHALL CONTINUE TO KEEP THE INFORMATION CONFIDENTIAL AFTER BROKER IS NO LONGER  
27 PROVIDING BROKERAGE SERVICES TO YOU.

28 THE FOLLOWING INFORMATION IS REQUIRED TO BE DISCLOSED BY LAW:

29 1. MATERIAL ADVERSE FACTS, AS DEFINED IN SECTION 452.01 (5g) OF THE WISCONSIN STATUTES (**SEE LINES 47-55**).

30 2. ANY FACTS KNOWN BY THE BROKER THAT CONTRADICT ANY INFORMATION INCLUDED IN A WRITTEN INSPECTION  
31 REPORT ON THE PROPERTY OR REAL ESTATE THAT IS THE SUBJECT OF THE TRANSACTION.

32 TO ENSURE THAT THE BROKER IS AWARE OF WHAT SPECIFIC INFORMATION YOU CONSIDER CONFIDENTIAL, YOU MAY LIST  
33 THAT INFORMATION BELOW (**SEE LINES 35-36**). AT A LATER TIME, YOU MAY ALSO PROVIDE THE BROKER WITH OTHER  
34 INFORMATION YOU CONSIDER TO BE CONFIDENTIAL.

35 **CONFIDENTIAL INFORMATION:** \_\_\_\_\_

36  
37 **NON-CONFIDENTIAL INFORMATION** (The following information may be disclosed by Broker): \_\_\_\_\_

38  
39 *(INSERT INFORMATION YOU AUTHORIZE THE BROKER TO DISCLOSE SUCH AS FINANCIAL QUALIFICATION INFORMATION.)*

40 **CONSENT TO TELEPHONE SOLICITATION**

41 I/We agree that the Broker and any affiliated settlement service providers (for example, a mortgage company or title company) may  
42 call our/my home or cell phone numbers regarding issues, goods and services related to the real estate transaction until I/we  
43 withdraw this consent in writing. **List Home/Cell Numbers:** \_\_\_\_\_

44 **SEX OFFENDER REGISTRY**

45 *Notice: You may obtain information about the sex offender registry and persons registered with the registry by contacting the*  
46 *Wisconsin Department of Corrections on the Internet at: <http://offender.doc.state.wi.us/public/> or by phone at 877-234-0085.*

47 **DEFINITION OF MATERIAL ADVERSE FACTS**

48 A "material adverse fact" is defined in Wis. Stat. § 452.01(5g) as an adverse fact that a party indicates is of such significance, or that  
49 is generally recognized by a competent licensee as being of such significance to a reasonable party, that it affects or would affect  
50 the party's decision to enter into a contract or agreement concerning a transaction or affects or would affect the party's decision  
51 about the terms of such a contract or agreement. An "adverse fact" is defined in Wis. Stat. § 452.01(1e) as a condition or occurrence  
52 that a competent licensee generally recognizes will significantly and adversely affect the value of the property, significantly reduce  
53 the structural integrity of improvements to real estate, or present a significant health risk to occupants of the property; or information  
54 that indicates that a party to a transaction is not able to or does not intend to meet his or her obligations under a contract or  
55 agreement made concerning the transaction.

No representation is made as to the legal validity of any provision or the adequacy of any provision in any specific transaction.

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Drafted by Attorney Richard J. Staff